

FOREIGN TOURISM IN THE REGIONS OF SLOVAKIA WITH A FOCUS ON POLISH VISITORS

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Abstract: *Presented paper is devoted to the issue of foreign tourism in the regions of Slovakia with a focus on Polish visitors. In the first part of this paper, we focused on the structure of the visit rate of foreign visitors and the number of overnight stays spent in individual self-governing regions (NUTS 3) of Slovakia in 2012, with emphasis on the enclave of Polish visitors creating the second largest group of visitors (163 754 visitors - 10.7%) after Czech visitors (491 136 visitors - 32.2%). Evaluated state is the result of longer-term processes that were analyzed in the time period of 2001 - 2012. In the second part of the paper, considering the borderland position with Poland as well as the highest number and proportion of Polish visitors, the focus is given to the Žilina and Prešov self-governing regions (together they were visited by 94 515 Polish visitors, i.e. 57.7% share within the Slovak Republic). For more detailed analysis of space-time context, evaluation of the issue was shifted to the district level (NUTS IV) namely 11 districts of the Žilina self-governing region and 13 districts of the Prešov self-governing region. In conclusion, the causes of observed trends are discussed (such as the entry of Slovakia and Poland into the EU, adoption of the Euro in Slovakia, tourism policy in both countries, etc.) and possible future directions in this issue are indicated.*

Key words: *inbound tourism, tourist rate, overnight stay, Slovakia, Poland, Prešov self-governing region, Žilina self-governing region*

INTRODUCTION

The purpose of this paper is to show the numbers, directions, and spatial distribution of Polish tourist arrivals in Slovakia. The analysed period included the years 2001-2012. Source material used for this paper are data published by the Institute of Tourism in Warsaw on tourist trips of Poles as well as Slovak statistics on guests registered at accommodation facilities.

The data on tourism used in the article are secondary and approximate. Polish and Slovak institutions collecting and processing data use different methodologies. It makes the direct comparison of data impossible. However, the data show development trends of the Polish tourism in Slovakia in the analysed period and the impact of

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economic and social macroprocesses as well as the changing characteristics of Polish and Slovak tourist markets on the size and structure of tourism.

It is important to remember that the data on the number of tourists include only persons who have spent at least one night abroad. One-day tourists are not included in these data. It is crucial for analysing tourist traffic between Poland and Slovakia because one day tourists account for an important and perhaps the predominant component of this tourist traffic, especially in the border area (the cross-border region). One-day tourists, however, are not recorded.

MATERIALS AND RESEARCH METHODS

Tourism as an economic industry has great prospects for the future. It significantly enters into the economic balance of many countries. It creates jobs without the need for major investments. Tourism provides significant opportunities for structural changes in the economy of the emerging countries of Central and Southeast Europe. On a global scale, tourism is a major employer. In 2010, according to the International Labour Organization, 235 million people (8% of total employment) worked in tourism, while it contributed 9% to the creation of world GDP. It is expected that by 2019, it will have employed about 296 million people.

According to *Forecasts of tourism for 2020* prepared by the World Tourism Organisation (WTO), by 2020, the world's population will have accomplished about 1.6 billion foreign tourist routes. Tourists will have spent more than \$ 2 billion for their routes. These data represent the average annual growth rate of foreign routes by 4.3% and spending on these routes by 6.7%. Unfortunately, WTO states that only 3.5% of the world population will have participated in international tourism. It is assumed that most foreign routes will have aimed to Europe, with the largest annual growth in Central and Eastern Europe (4.9%) and the lowest growth in Western Europe (1.8%).

Development of tourism significantly contributes to the development of the economies of many countries, but on different level. While in 2012, tourism in Slovakia contributed 2.5% to the overall GDP, in neighbouring Austria it was 5.5%. Difference in comparison is more than double; however, Austria and Slovakia are missing only one from 40 criteria that WTO recognizes - the sea. Therefore, more significant support on the Slovak side is necessary, which compared to neighbouring countries such as the Czech Republic, Hungary or Poland is lagging. According to Development strategy of tourism in Slovakia, by 2016, the share of tourism in total GDP should increase to 2.8% and by 2030 to 3.2%.

According to *The Travel and Tourism Competitiveness Report 2011*, Slovakia is increasingly less competitive in tourism. By The Travel & Tourism Competitiveness Index of this report, which includes three sub-indices (T&T Regulatory Framework, T&T business, environmental and infrastructure, T&T human, cultural and natural), the position of Slovakia with the value of 4.35 points is in total 54th place (in 2009 - 49th place) from 139 assessed countries. For comparison, the position of the Czech Republic in 2011 was 32nd place (4.71), Hungary 38th place (4.54) and Poland 49th place (4.38).

Although total income from tourism is made up of about 80% of income from domestic tourism, importance of international tourism is significantly increasing (it is estimated that over the past half century, the number of participants of international tourism has increased from 25 to 612 million and income from 2.1 billion to 444 billion USD).

For the development of individual countries is especially crucial active inbound tourism, as spending of foreign visitors is expressed in the active balance of tourism as part of the balance of payment of the state. The consumption of services produced in their own territory by domestic actors of tourism for products made in another country occurs.

When evaluating inbound tourism in Slovakia attention was focused on the Polish visitors. Basic statistic information was available from Polish sources as well as from the databases of the Statistical Office in Slovakia. While comparing both sources of information, quite significant differences occurred. The fact that in the case of arrival of Polish visitors an economic benefit is on the part of Slovakia, following the number of Polish visitors and their activities is inevitably more under the spotlight of the Slovak statistics, resulting in a clearer and more detailed information. For this reason we focus on the evaluation of resources from the Statistical Office of the Slovak Republic.

The basic data about the visit rate of Polish visitors available in the database of the Statistical Office of SR, were: a) the number of visitors from Poland, b) the number of overnight stays spent by visitors from Poland and c) the average number of overnight stays of visitors from Poland. The advantage of these indicators was their availability on the district level, which was later used in the evaluation of selected districts. Unfortunately, it was not possible to evaluate the economics of the visit rate because the necessary data in the resulting data are not published separately for foreign visitors of the individual countries, but only in the form of aggregate values for all international visitors together (e.g. income from accommodation). Therefore, it is difficult to estimate the share of income from the Polish visitors. According to data from 2012, income for the accommodation of foreign visitors in Slovakia was 129.5 million Euro (i.e. 48% of total income for the accommodation), while Polish visitors accounted by the number represent (163 754 visitors, 10.7% of all visitors) after the Czech tourists - the second largest group. Therefore, it can be estimated that from the above mentioned amounts for revenues Polish visitors created around 10-15% share.

In the evaluation of the visit rate of Slovakia and its individual regions by Polish visitors, we followed two levels of evaluation. The first part of the evaluation was on the level of Slovakia and its individual self-governing regions (NUTS III), the second part pay the attention to two selected self-governing regions (Žilina and Prešov) for their location on the border with Poland and the specific position within the visit rate of Polish guests. For the need of more detailed analysis of the above mentioned regions, it was necessary to differentiate and more closely followed the selected processes associated with tourism and visit rate at lower hierarchical level of districts (NUTS IV). It was specifically the 11 districts of the Žilina self-governing region (Bytča – BY, Čadca – CA, Dolný Kubín – DK, Kysucké Nové Mesto – KM, Liptovský Mikuláš – LM, Martin – MT, Námestovo – NO, Ružomberok – RK,

Turčianske Teplice – TR, Tvrdošín – TS, Žilina – ZA) and the 13 districts of the Prešov self-governing region (Bardejov – BJ, Humenné – HE, Kežmarok – KK, Levoča – LE, Medzilaborce – ML, Poprad – PP, Prešov – PO, Sabinov – SB, Snina – SV, Stará Ľubovňa – SL, Stropkov – SP, Svidník – SK, Vranov nad Topľou – VT).

From a chronological point of view, we selected the period of the years 2001 - 2012 for the needs of evaluation and comparison that encompassed not only the most important events connected with the development of tourism in both countries, but also the processes that were essential for the achievement of an important framework for further development of both countries.

ACHIEVED RESULTS

The current situation of the visit rate in Slovakia by the Polish visitors is the result of the formation of tourism over a longer period, which was significantly affected by economic, political and social transformation in both countries after the changes in the early 1990's. This period was significant in changes in the economy, the privatization process, increase of private sector and changes in the ownership, which was reflected in tourism. Increase in purchasing power of the population, strongly pro-European orientation and efforts to reduce disparities compared to Western European countries started the modernization processes and new trends in tourism, which resulted in an increase in foreign tourism.

The 1990's and the beginning of the 21st century brought a significant increase in tourist activity of Poles. The number of Polish tourist trips abroad in the years 2001-2011 ranged between 6 and 7 million. In 2012, there was a significant increase in the number of tourist trips to 10 million.

Slovakia is traditionally an attractive country for Polish tourists because of its natural and cultural heritage (Faracik 2012). Slovakia is perceived as a country where you can practice different forms of active recreation, such as hiking, mountain biking, cycling, water recreation on water reservoirs and the Carpathian rivers as well as specialised forms of recreation, such as canoeing and caving. Slovakia is also regarded as a wealth of tangible cultural assets in the form of historic cities and districts, attractive landscapes with castles and palaces, as well as caves available to the public.

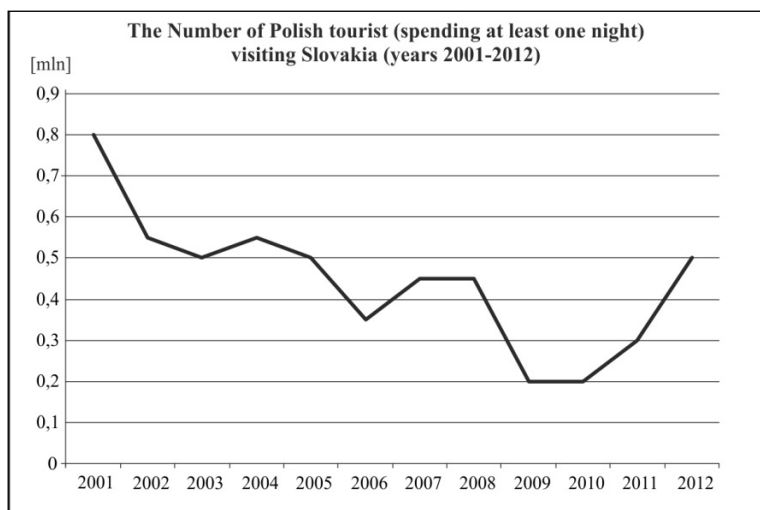
Tourist attractiveness of Slovakia for Polish tourists has increased in the 1990's due to investments in thermal baths facilities, which were implemented in Slovak towns located near the Polish border, as well as investments in the modernisation of ski resorts.

Slovakia is also an important transit country for tourists going to other countries of southern Europe and to Austria and Hungary. In 2012, the border with Slovakia was crossed by 7.6 million Polish citizens, which accounted for approximately 15% of all travel abroad.

A rapid growth in Polish tourist traffic to Slovakia was observed in the mid-1990s. It was caused, among other things, by the growth of wealth and purchasing power of Poles. Another important factor stimulating tourist traffic from Poland to Slovakia was the Slovak crown to the Polish zloty exchange rate that was beneficial to Polish tourists. The data of the Institute of Tourism indicate that at the beginning of

the twenty-first century, the volume of arrivals of Polish tourists in Slovakia reached the highest value – 0.8 million (2001). Since 2002, this number has declined steadily, and in subsequent years it stayed at around 0.4 - 0.5 million (Figure 1). In the years 2000-2011 tourist trips to Slovakia accounted for about 7 - 8% of total Polish tourist trips abroad.

Figure 1: *The number of Polish tourist (spending at least one night) visiting Slovakia (2001 – 2012)*



Source: *Instytut Turystyki in Warsaw, 2013*

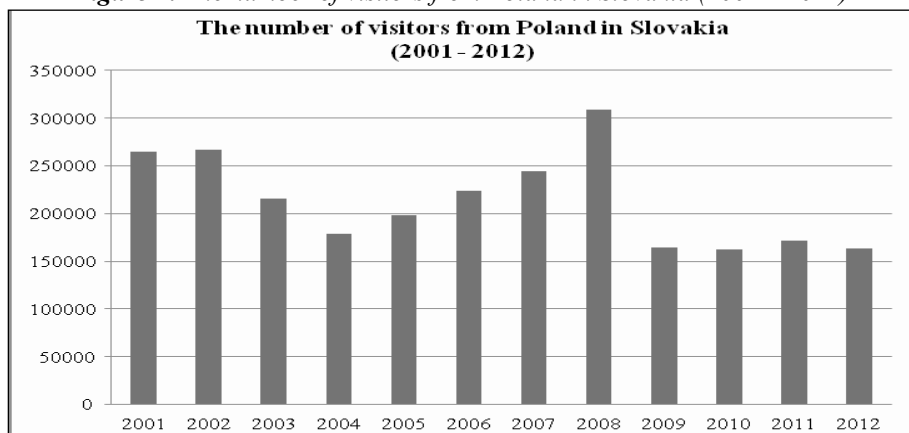
For more detailed assessment of the visit rate of Polish visitors in Slovakia were used statistical data from the Statistical Office of the Slovak Republic. In the analysis, because of the differences in methodology of Slovak and Polish statistics were used just Slovak data, which were more detailed and complex, which results from the fact that it is inbound tourism and its benefits accrue to the Slovak side.

In the first step of analysis, attention was focused on active tourism at Slovakia level and its individual regions.

Analyzing the development of the number of visitors from Poland in Slovakia (Figure 2) during time series from 2001 to 2012, three noticeable trends were evaluated. The first one had a decreasing character. We observe a decrease in the number of Polish visitors since 2001 respectively 2002 to 2004. In 2004, the trend began to turn in the direction of increase. This turnover significantly related to the entry of Slovakia and Poland to the EU and the gradual unification of legislation and the possibility of the use of support programs and EU structural funds for the completion of infrastructure and creation of new products in the field of tourism. In the last five years (since 2009), tourism was significantly affected by the economic crisis, mainly the Slovak inbound foreign tourism and the adoption of the Euro in Slovakia and neighbouring currencies fall, also the Polish zloty, which caused that holidays in Slovakia got more expensive for tourists from traditional countries such

as Poland and the Czech Republic. Decrease in the number of tourists from Poland between 2008 and 2009 was by 46.6%. This stagnation trend with small fluctuations has maintained until nowadays.

Figure 2: *The number of visitors from Poland in Slovakia (2001 – 2012)*



Source: www.statistics.sk

A similar development had values the share of Polish visitors of the total number of foreign visitors (Figure 3). Similarly as overall number of Polish visitors decreased since 2004, their share also declined (from 21.7% to 12.8%). After this year, there was a partial recovery and increase to the level of 17.5% (2008). Consequently, with the outbreak of the economic crisis and the introduction of the Euro in Slovakia, the share decrease during the year to 12.7% (2009), while in 2012 it was only 10.7%.

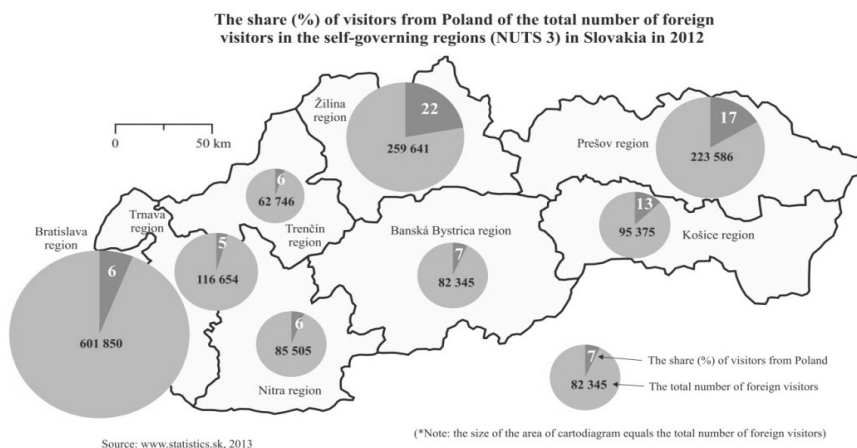
Figure 3: *The share (%) of visitors from Poland of the total number of foreign visitors in Slovakia (2001 - 2012)*



Source: www.statistics.sk

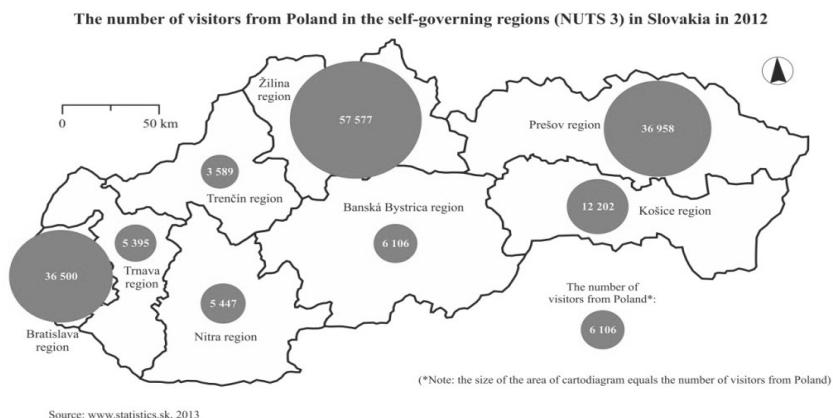
When assessing the situation in 2012, according to available information, most foreign visitors visited the Bratislava self-governing region (601 850 foreign visitors), within which is the capital of the country (Map 1). In this region, similarly as in other regions of south-western Slovakia the share of visitors from Poland was only 6%. The situation is different in the self-governing regions in the north of Slovakia which border with Poland (Žilina and Prešov self-governing regions). Within these two self-governing regions, characterized by natural and cultural tourist values, second respectively third highest number of foreign visitors was recorded (Žilina - 259 641 foreign visitors, Prešov - 223 586 foreign visitors). At the same time, what is important in view of the observed issue, was recorded the highest proportion of Polish visitors in both regions - the Žilina self-governing region (22.2%) and the Prešov self-governing region (16.6%).

Map 1



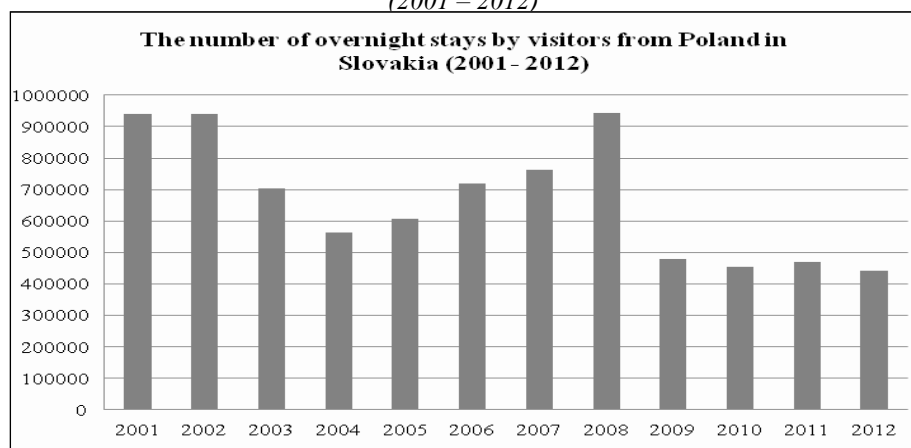
As already indicated in the map 1, higher share of Polish visitors in the Žilina and Prešov self-governing region, in comparing the absolute values which are most significant in the Žilina self-governing region (57 577 Polish visitors), the Prešov self-governing region (36 958 visitors) and the Bratislava self-governing region (36 500 visitors) - the higher number of visitors from Poland is unrelated to their higher share, but is related to a higher total number of foreign visitors, also Polish). In other self-governing regions due to the distance from the Polish border, the total number of Polish tourists is significantly lower (3 589 – 12 202).

Map 2



Similar diversity was recorded in the case of number of overnight stays (Figure 4). Years of changes were 2004 and 2008, when in 2004 there was a decline in overnight stays of visitors from Poland, followed by increase in 2008 and finally a significant fall (2008/2009 up to 49.1%), which has maintained at a comparable level in recent years.

Figure 4: The number of overnight stays by visitors from Poland in Slovakia (2001 – 2012)



Source: www.statistics.sk

This trend follows the share of overnight stays of Polish visitors in the total number of foreign visitors stays (Figure 5). While in 2001, the share was listed at 21.5%, in 2004 it dropped to 12.1%. Increase again occurred with the culmination in 2008 (17.9%), while the further development was decreasing to the level of 10.8% in 2012.

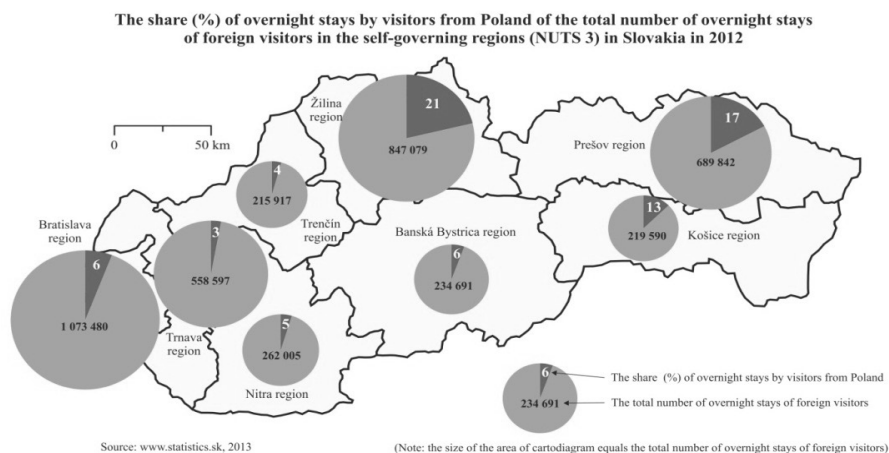
Figure 5: The share (%) of overnight stays by visitors from Poland of the total number of overnight stays (2001 – 2012)



Source: www.statistics.sk

Significantly differentiated situation in the case of visitors from Poland in individual regions was also reflected in the case of overnight stays (map 3). The share of the number of overnight stays of Polish visitors in the total number of foreign visitors stays was comparable with the previous indicator – Žilina (21.2%), Prešov (17.2%) and Bratislava (5.8%) self-governing region.

Map 3

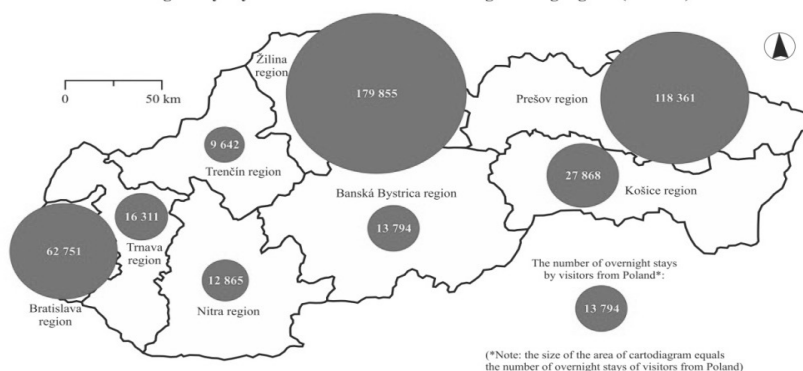


Difference was observed in the absolute number of overnight stays of Polish guests (Map 4). The most overnight stays by visitors from Poland were in the Žilina self-governing region (179 855 overnight stays), followed by the Prešov self-

governing region (118 361 overnight stays) and the Bratislava self-governing region (62 751 overnight stays). It is interesting that in a comparable number of visitors from Poland in the Bratislava (36 500) and Prešov self-governing regions (36 958), the number of overnight stays of Poles in the Prešov self-governing region was higher by 55 610 (46.9%). This is largely due to the short-term stays in the Bratislava self-governing region with an average of only 1.8 overnight stays while in the Prešov self-governing region it was up to 3.2 overnight stays.

Map 4

The number of overnight stays by visitors from Poland in the self-governing regions (NUTS 3) in Slovakia 2012



From the above analysis, it results that the main locations of visitors from Poland are mainly Žilina and Prešov self-governing regions. These regions contributed to the overall visit rate of Polish clientele in Slovakia by 57.7% (94 535 visitors) and the number of overnight stays of Poles by 67.6% (298 216 overnight stays).

Based on previous evaluations, the next part of the paper is closer devoted to these two regions. For a detailed analysis and evaluation, we selected districts for observational units (NUTS IV). We observed 11 districts of the Žilina self-governing region and 13 districts of the Prešov self-governing region.

Within the Žilina self-governing region, in 2012, the visit rate in individual districts was significantly differentiated (Map 5). The highest visit rate from Poland was within the district of Liptovský Mikuláš (35 856 visitors) and Ružomberok (8 237). According to the regionalization of tourism in Slovakia, these two districts together form Liptov region of tourism, which in the total visit rate in the Žilina self-governing region in terms of visitors from Poland contributed to 76.6%. The overall higher number of Polish visitors was also reflected in their higher percentage share of the total number of foreign visitors (LM - 30% and RK - 22%) (Map 6).

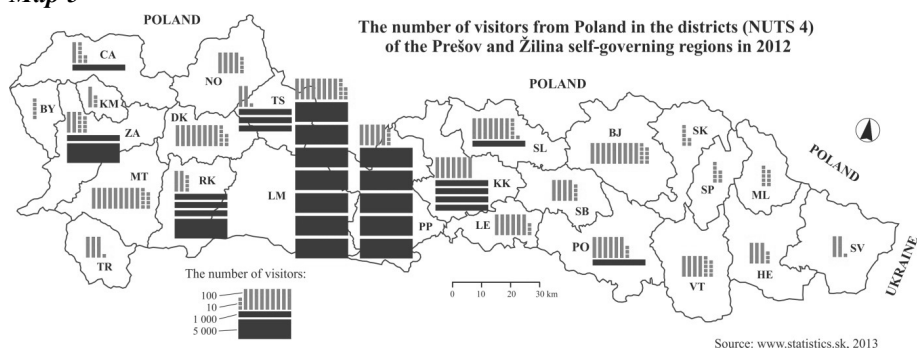
The second destination for Polish visitors was the district of Žilina (6 288 visitors) with the capital district town Žilina, which is also the centre of North-Považie region of tourism. This region includes more districts like Čadca (1 173 visitors from Poland), Bytča and Kysucké Nové Mesto, while in the last two the visit rate was

negligible. Overall, in this region of tourism, the share of Polish visitors moved in the range 11-18%.

The third in the highest number of Polish visitors was the Orava region of tourism - 4 524 visitors with the dominant district of Trstená (70.9% share). In districts of Trstená and Námestovo the share of Polish visitors of the total number of foreign visitors was one of the highest (24% resp. 28%).

The last in the importance was Turčiansky region of tourism where in the districts of Martin (990 visitors) and Turčianske Teplice (312 visitors) the visit rate of the Poles throughout the region was the lowest (only 2.3%). It is the only region of the Žilina self-governing region, which is not adjacent to Poland, which also had significant impact on the values of the visit rate.

Map 5

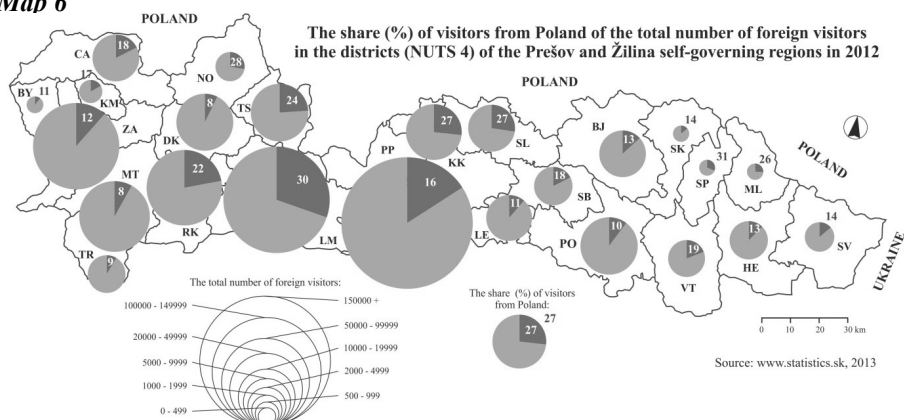


Similarly, significant differentiation in the visit rate of Polish tourists was also in the Prešov self-governing region (Map 5). In the western part of the self-governing region is significantly formed a centre represented by the Tatra region of tourism (31 992 visitors from Poland, 86.6% of the region) - the districts of Poprad (25 535 Polish visitors), Kežmarok (4 695 Polish visitors) and Stará Ľubovňa (1 762 Polish visitors). At the same time, in this region there is the highest share of visitors from Poland (from 16% to 27%) (Map 6).

The second in importance was the Šariš region of tourism (3 131 visitors from Poland, 8.5% of the region) with the centre in the district of Prešov (1 634 Polish visitors). Other districts are represented less (Bardejov - 991 Polish visitors, Sabinov - 441 Polish visitors and Svidník - 65 Polish visitors).

The last in importance was the Upper-Zemplín region of tourism, which is represented by five districts (Humenné, Snina, Medzilaborce, Stropkov and Vranov n/T.), but its share of the visit rate was very low (only 4.9%). Shares of visitors in some districts like Stropkov and Medzilaborce ranged up to 31% respectively 26%, but at such low absolute number of Polish visitors it was negligible. The most Polish visitors were in the districts of Vranov n/T. (486 visitors), Humenné (330 visitors) and Snina (210 visitors).

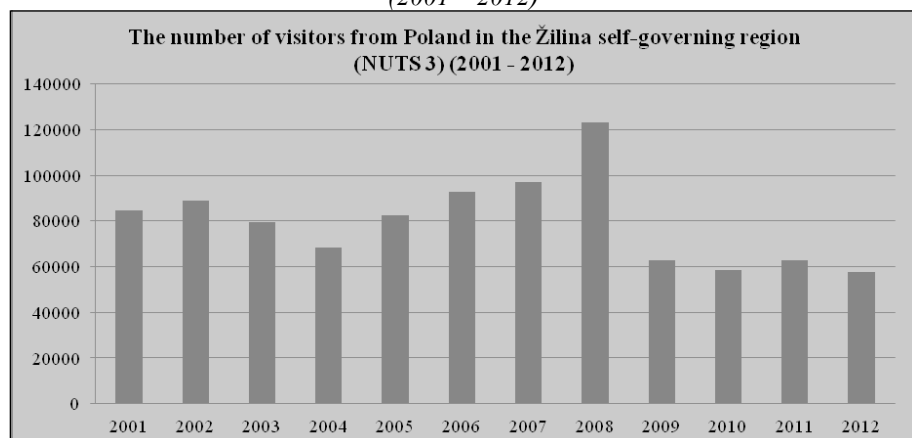
Map 6



In terms of the number of visitors from Poland in the years 2001-2012, the trend in the compared self-governing regions was slightly different.

In the Žilina self-governing region (Figure 6) fluctuations in the number of Polish visitors in the period 2001-2007 were not so noticeable (interval 68 thousand - 97 thousand visitors). Maximum was recorded in 2008 (as already several times in previous comparisons) 123 269 visitors (i.e. 146% of the state in 2001). This was followed by a significant fall in 2009 by 49.1%, while this condition has maintained at around 60 thousand visitors nowadays.

Figure 6: The number of visitors from Poland in the Žilina self-governing region (2001 – 2012)

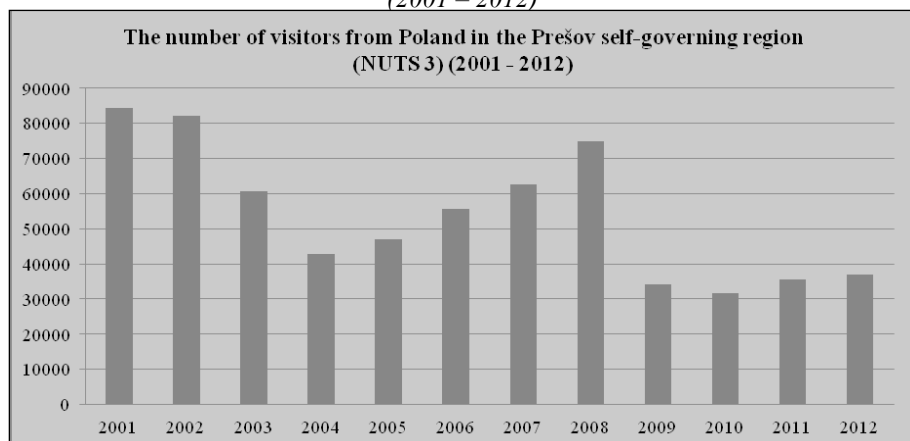


Source: www.statistics.sk

In the Prešov self-governing region (Figure 7), the development of the number of visitors from Poland was more tendentious. The highest values were at the beginning of the evaluation in 2001 84 501 visitors. In the next period, there was a significant decrease to the level of 42 964 visitors (2004, a decrease of almost

50%). Following development period until 2008 is followed by increase of 42.6% to 74 793 visitors from Poland, but compared to the Žilina self-governing region, in the Prešov self-governing region did not reached the value from 2001. Thanks to above mentioned reasons, a significant fall occurred in 2009 by 54.2% to the lowest observed values (34 231 visitors from Poland) for the entire assessment period. This tendency, unfortunately, with only minor fluctuations has maintained to the present. When comparing the visit rate in both self-governing regions, it is clear that the effects of major socio-economic processes significantly displayed within the Prešov self-governing region, especially in 2001-2008.

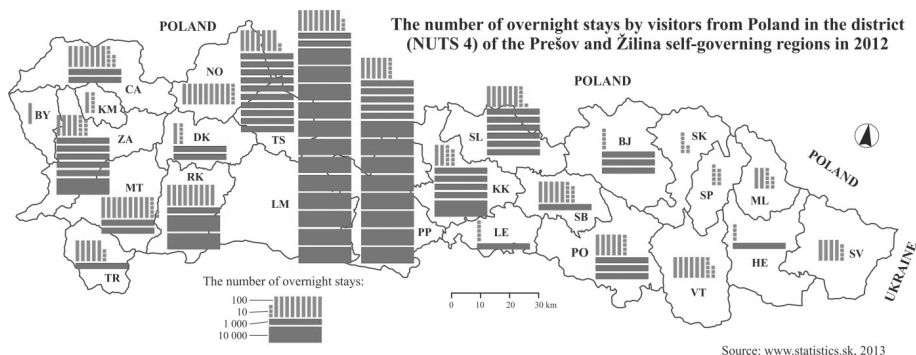
Figure 7: *The number of visitors from Poland in the Prešov self-governing region (2001 – 2012)*



Source: www.statistics.sk

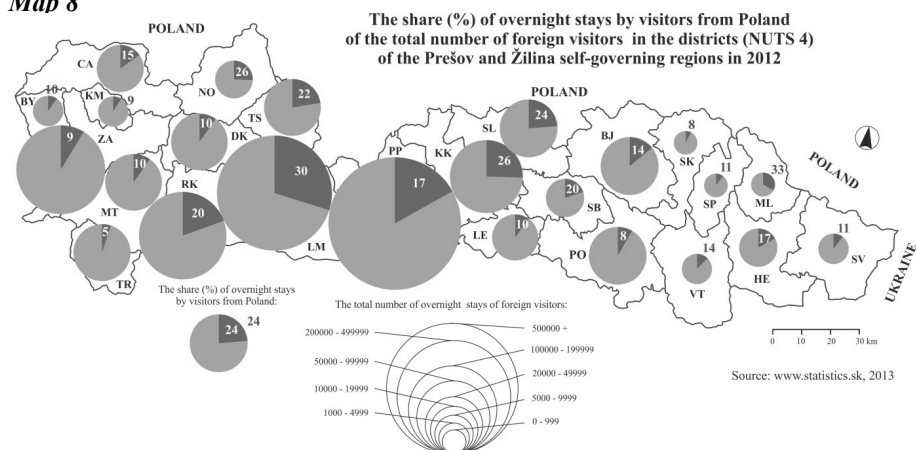
The following evaluated category - the number of overnight stays of Polish visitors (2012) is reflected by the number of Polish tourists. Within evaluated self-governing regions, there are markedly dominant districts (Map 7). In the Žilina self-governing region, it was the district of Liptovský Mikuláš (122 833 overnight stays of visitors from Poland, 68.3% of the self-governing region) and in the Prešov self-governing region, it was the district of Poprad (85 546 overnight stays of visitors from Poland, 72.3% of the self-governing region). In the Žilina self-governing region, there were also dominant the district of Ružomberok (21 189 overnight stays of visitors from Poland), which together with the district of Liptovský Mikuláš formed dominant concentration of Polish overnight stays within the Liptov region of tourism and the district of Žilina (15 486 overnight stays from Poland) and Trstená (9 722 overnight stays from Poland). In above mentioned districts of the Žilina self-governing region (Map 8), except of the district of Žilina, they obtained the highest values of shares of overnight stays of visitors from Poland (from 20% to 30%) of the total number of overnight stays by foreign visitors.

Map 7



In this indicator, the Prešov self-governing region obtained even more inequality (Map 7). The district of Poprad reached far higher values as the district of Kežmarok (14 292 overnight stays of visitors from Poland) and Stará Ľubovňa (6 658 overnight stays of visitors from Poland). These three districts form the dominant core of the Prešov self-governing region in the form of the Tatra region of tourism (together they make up 90.0% of region). Other districts were only incidental to the relatively higher number of overnight stays spent by visitors from Poland only in the district of Prešov (3 551 overnight stays from Poland) and Bardejov (3 054 overnight stays from Poland). Significance of other 8 districts is negligible (together only 4.4%). In case of the share of overnight stays of visitors from Poland of the total number of overnight stays by foreign visitors, a dominant position have the districts of the Tatra region of tourism (Kežmarok - 26%, Stará Ľubovňa - 24% and Poprad - 17%) (Map 8).

Map 8

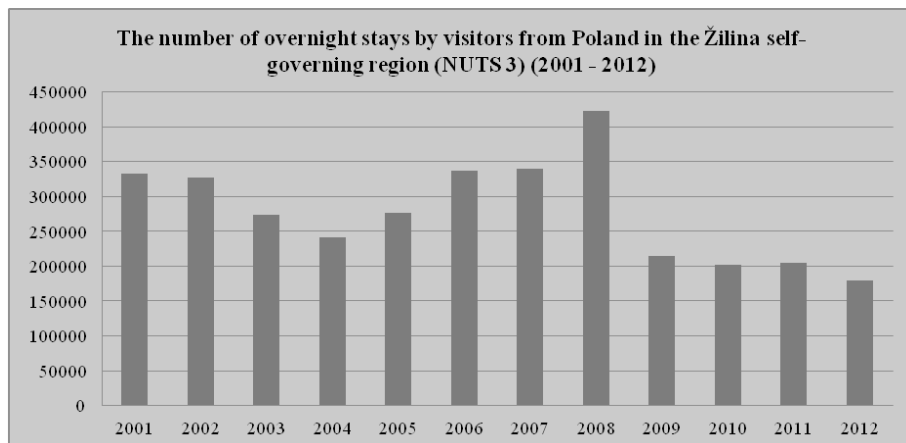


In terms of the number of overnight stays spent by visitors from Poland in years 2001-2012, the trend is slightly different in the compared regions.

In the Žilina self-governing region, the number of overnight stays of Polish visitors in 2001 and 2002 was from 327 540 to 332 152 overnight stays (Figure 8).

Then in 2004, there was a decline at the level of 240 653 visitors. After the opening of the borders and the entry of Slovakia and Poland into EU structures, the number of Polish visitors increased in 2008 to 422 922 visitors. Subsequently, in 2009, due to the adoption of the Euro and the onset of the economic crisis there was a decline by 49.3% to 214 363 visitors. This trend still further deteriorated, and in 2012 it was only 179 855 Polish visitors.

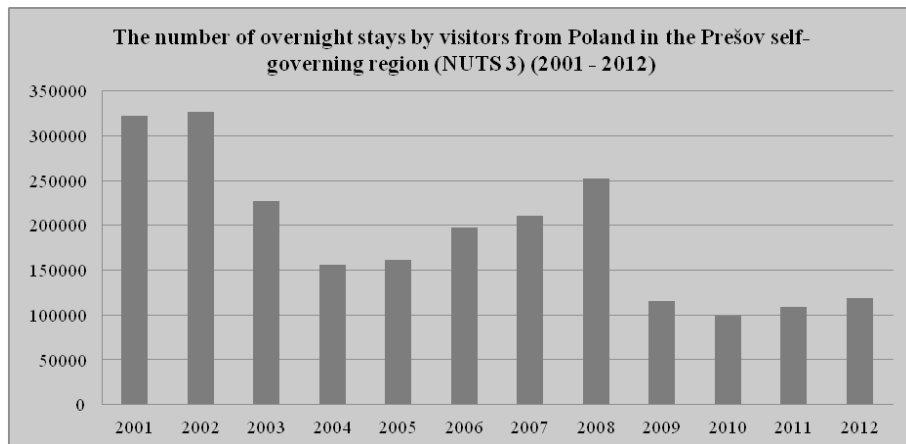
Figure 8: *The number of overnight stays by visitors from Poland in the Žilina self-governing region (2001 – 2012)*



Source: www.statistics.sk

In the Prešov self-governing region, we can observe similar trends, but with some variations (Figure 9). The highest number of overnight stays by visitors from Poland was recorded in 2001 and 2002 (332 365 and 326 996 visitors), which was comparable to the Žilina self-governing region. However, such high values failed to be achieved until the end of the whole period. In the Prešov self-governing region, minimum was recorded in 2004 (155 551 visitors from Poland), but maximum in 2008 was only at the level of 251 915 visitors (i.e. 75.8% of the state from 2001, for comparison - in the Žilina self-governing region it was 127.3%). Similarly like in the Žilina self-governing region, there was recorded a fall in 2009 (by 54.3% compared to 2008) just to 115 100 visitors, which has been maintained up to the present (2012).

Figure 9: *The number of overnight stays by visitors from Poland in the Prešov self-governing region (2001 – 2012)*



Source: *www.statistics.sk*

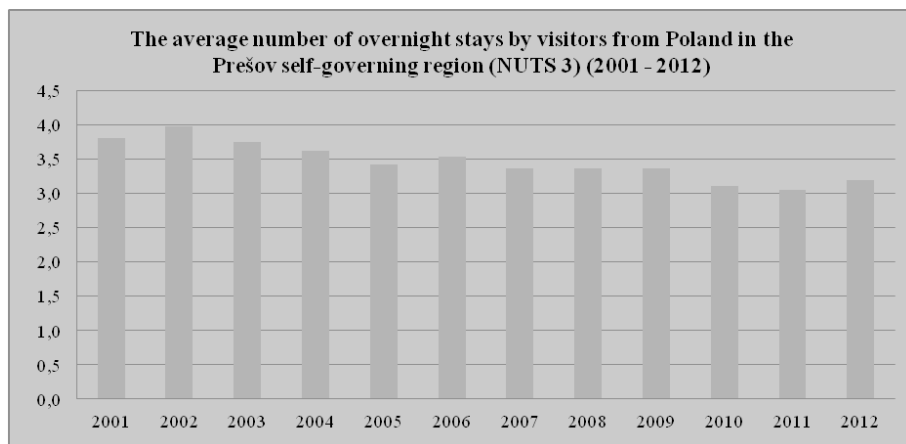
The third compared indicator was the average number of overnight stays spent by Polish visitors. The development of this indicator was in both self-governing regions similar (Figures 10, 11). The highest values were in 2001 (the Žilina self-governing region 3.9 overnight stays) respectively in 2002 in the Prešov self-governing region 4.0 overnight stays. From this period, there is a permanent decline in the number of overnight stays spent by visitors from Poland to 3.1 nights in the Žilina self-governing region and 3.2 in the Prešov self-governing region in 2012. Very specific in both self-governing regions are the spa districts of Bardejov and Turčianske Teplice with a higher average number of overnight stays (Bardejov - 6.3 overnight stays; Turčianske Teplice - 4.9 overnight stays); however, these values were achieved mainly thanks to domestic rather than foreign guests. Considering the general tendency to take several shorter holidays in a year, it can be assumed that neither the average number of overnight stays will increase in the future.

Figure 10: The average number of overnight stays by visitors from Poland in the Žilina self-governing region (2001 – 2012)



Source: www.statistics.sk

Figure 11: The average number of overnight stays by visitors from Poland in the Prešov self-governing region (2001 – 2012)



Source: www.statistics.sk

CONCLUSIONS

According to the observed trends of evaluated indicators (number of visitors from Poland, the number of overnight stays of visitors from Poland, the average number of overnight stays spent by visitors from Poland), it is possible to specify the particular trends of the visit rate of Polish visitors. During the analyzed period (2001-2012) the significant development in tourists arrivals from Poland was observed in the years 2004 and 2008 respectively 2009.

In the period 2001-2004, all evaluated indicators declared attenuated and degressive tendencies. Year 2004 marked a significant turnaround in connection with Slovakia's and Poland's enter to the EU and the gradual elimination of customs and border barriers. The great economic benefit was the use of support programs and EU structural funds for the completion of infrastructure and creation of new tourism products. After the entry into EU, both countries have the possibilities to obtain the latest information and experience, to participate in a variety of educational programs designed to assist the Member States through the development of expertise and acquiring know-how in the field or to influence policy-making of EU tourism. Finally, the promotion and advertising of the regions of Slovakia and mutual information about the range of activities of tourism on both sides of the border have improved. Following years 2005 to 2008 had in this context substantially developmental nature, which was confirmed by the evaluation of indicators as the number of visitors from Poland and the total number of overnight stays at the level of Slovakia and both evaluated self-governing regions (2004/2008 increase in the indicators from 38.3% 44.5%).

The following year 2009 was the year of significant change, which had a significantly negative impact on the visit rate from Poland. In this year, Slovakia entered into the Euro Zone, what had an impact on the exchange rate and the strengthening of the Euro against the Zloty. This effect was more magnified by the outbreak of the global economic crisis in its full extent. Both of these facts affected the values of evaluated indicators (number of visitors from Poland and the number of overnight stays) by a decrease from 46.6% to 54.3% (2008/2009). Decline in the evaluated indicators was so significant that the situation in 2009 was worse than in 2004 and it did not improve until 2012.

Development of the visit rate of Polish guests is also related to its characteristics. According to a survey conducted by SACR (Slovak Tourist Board) among Polish visitors, significantly preferred is winter tourism, which is associated with skiing and spa respectively aquaparks. This unique combination significantly preferred the Liptov region of tourism, the Tatra region of tourism and the Orava region of tourism, which was confirmed by monitored indicators (Maps 5, 6). Dominant attraction for Polish visitors is the combination of year-round tourism within the Tatras (with the peak in the winter months) and the Pieniny and year-round use of aquaparks (Tatralandia, Bešeňová, Oravice, Aquacity Poprad). For the promotion of tourism regions in Slovakia is interesting the finding from the survey, according to which Polish visitors obtain the most information about Slovakia from television (55.8%), catalogues, travel agencies (44.5%), Internet (38.8%), exhibitions of tourism (26.8%) and the recommendations of friends and acquaintances (23.0%). Visitors from Poland make their decisions to spend a holiday in Slovakia not until the last minute, but some time in advance (2-4 months - 36.0% and 5-7 months - 33.3%). Interesting finding of the survey was that 67% of Polish visitors prefers hotels, thus expected image of the Polish visitor searching for cheap accommodation was not confirmed. The last was the claim that although the initial image of Slovakia among Polish visitors was not at a high level, satisfaction prevailed after a visit of Slovakia as well as a willingness to return and recommend Slovakia as an interesting tourist

destination. These results were even better than in the case of visitors from the Czech Republic, who make up the largest share of foreign visitors in Slovakia (in 2012 it was 32.2%).

The main factors affecting inbound tourism from Poland to Slovakia in addition to the above mentioned include:

- a) the two countries being direct neighbours and the proximity of large urban complexes on the Polish side to the border with Slovakia, especially the Katowice conurbation and the metropolitan area of Krakow;
- b) the high attractiveness of Slovakia for different forms of tourism, which is resulting from its wealth of tourist assets and facilities allowing to practice active forms of recreation in summer and winter;
- c) a significant improvement in accessibility of Slovakia for Polish citizens, due to both the development of expressways network in Poland and the improvement of internal accessibility in Slovakia;
- d) the development of economic ties between the two countries, which becomes a factor in the development of business tourism;
- e) specialisation of the offer of Slovak spas and raising the standards of spa services.

The most important barrier in the development of Polish incoming tourism in Slovakia is the cost of stay in Slovakia. Due to prices in euro, the cost is considered high by Polish tourists and it is the reason why Slovakia is perceived as a relatively expensive country if compared with Polish tourist resorts.

In terms of future development of the visit rate of Polish guests in Slovakia we cannot expect any significant changes. The values from years 2001, 2002 respectively 2008 will be very difficult to approach. In European regions, competition struggle for the visitor sharpens and quality services are offered by a growing number of regions. The same also fits for Polish regions and the Polish approach to the development of domestic tourism. The economic crisis of recent years have greatly affected the field of tourism and verified the ability of regions and subjects of tourism to adapt to changes and the new situation.

According to Gučík, Petrik (2012), the current trends in tourism include in particular the growth of interest in the comfort and safety of visitors, orientation of visits for relaxation, wellness and spa. Short-term stays as well as individual package holidays focused on culture, art and history will dominate (the growth of interest will be on Central and Eastern Europe). Customer satisfaction expressed by again return will be important as well as increased interest in a more personal approach in providing services (small family businesses) and thus closer specialisation of service providers in the product for selected target group of visitors.

It is still questionable how Slovak regions will deal with the current situation. Gradual improvement can be expected. The year 2012 is considered by many experts as the first year which marked the start of economic development and the first signs of decline of global economic crisis. In the next few years, we will know whether these positive signals will be expressed by the improvement of the economic situation of the population (in Slovakia and abroad) and the possibility of using the part of the income for vacation and thus promote the development of tourism.

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